

FINANCIAL ANALYST

DEFINITION

Performs a variety of complex journey-level professional staff work related to the analysis of financial and budgetary data, the preparation of year-end reports, and long-range cash flow projections.

TYPICAL DUTIES

- Conducts complex budget and financial studies by collecting, analyzing, and compiling data and prepares reports and recommendations based on findings.
- Confers with District administrators in such areas as budgetary and financial management and economic analysis.
- Makes written and oral presentations on budgetary and financial management matters to college executives, committees and groups of District administrators.
- Maintains the current status of the District's financial position by reviewing expenditure data and maintaining records of funds received.
- Collects, compiles, describes, organizes analyzes, and interprets data and prepares periodic and special business and financial reports in graphic, pictorial, tabular, written, and oral form.
- Writes financial reports containing descriptive, analytical, and evaluative content including the preparation of conclusions and forecasts based on data summaries and other findings.
- Surveys and investigates practices, procedures, and methods in private firms and public jurisdictions in order to find solutions to problems or improvements in financial operations which can be applied to the District.
- Analyzes the possible effects of proposed laws and regulations, codes, and ordinances that affect the budgetary and financial activities of the District.
- Writes instructions, procedures, and manuals involving budgetary and financial management areas.
- Analyzes and makes recommendations on budget requests and prepares budget proposals.
- Provides technical assistance and training to staff on matters related to budgetary and financial management.
- Fully utilizes the capabilities and functions of standard office software applications such as data management, spreadsheet, presentation, and word processing in completing assigned projects.
- Fully utilizes the capabilities of specialized software programs in the production of management information and reports.
- Develops financial record systems.
- May supervise lower-level analysts and clerical support staff.
- Performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

A **Financial Analyst** performs a variety of complex professional-level staff work related to the analysis of financial and budgetary data, the preparation of year-end reports, and long-range cash flow projections.

DISTINGUISHING CHARACTERISTICS (Cont.)

A **Senior Financial Analyst** performs the more difficult and complex financial and budgetary studies and supervises a small staff engaged in the formulation, analysis, and execution of budget and financial management plans, and the development of budgetary policies, procedures and operations.

An **Assistant Financial Analyst** performs professional level staff work of moderate complexity related to the analysis of financial and budgetary data and financial planning. The class of **Assistant Financial Analyst (Confidential)** is distinguished from the class of **Assistant Financial Analyst** because the employee, in the regular course of his or her duties, is required to have access to, or possess information relating to, the District's employer-employee relations.

SUPERVISION

General supervision is received from a classified administrator or supervisor. Functional supervision may be exercised over lower-level analysts, and clerical employees.

CLASS QUALIFICATIONS

Knowledge of:

- Principles, practices, methods, and systems of budgetary and financial management
- Principles, practices, and theories of accounting
- Federal, state and local laws, ordinances, codes, regulations affecting the financial management of the District
- Research methods and techniques
- Methods of statistical analysis and presentation
- Current developments and trends in financial management
- Capabilities of computer systems, software, and hardware used in financial and budgetary management
- Organization and management of records

Ability to:

- Prepare budget and financial plans to meet District objectives
- Collect, analyze, interpret, and evaluate complex budgetary and financial management data, statistics, and trends and make recommendations
- Interpret and apply laws, rules, regulations, and policies to financial and budgetary management
- Effectively utilize computer equipment, software, and management information systems in the performance of duties
- Devise practical solutions to complex problems
- Prepare clear and concise reports of budgetary, financial, and statistical data
- Exercise creativity and critical judgment

Ability to: (Cont.)

- Deal with novel and difficult problems
- Train and provide technical assistance to others
- Present complex technical information both orally and in writing
- Evaluate work methods and procedures
- Work independently on assigned projects
- Establish effective inter-personal communications and secure the cooperation of administrators in the implementation of District procedures
- Work effectively with District staff and representatives from private and public agencies
- Write clear, comprehensive, and effective reports
- Plan and organize work to meet deadlines
- Learn specialized computer applications

ENTRANCE QUALIFICATIONS

Education and Experience:

- A. Graduation from a recognized four-year college or university, preferably with a major in accounting, finance, economics, business administration or public administration **AND** three years of professional level full-time paid experience in an accounting, finance, administrative analysis, auditing, or budgeting position, including one year of experience in financial analysis or budget analysis and development.

OR

- B. A master degree from a recognized four-year college or university with a major in accounting, finance, economics, business administration or public administration **AND** one year of professional level full-time paid experience in financial analysis or budget analysis and development in an accounting, finance, administrative analysis, auditing, or budgeting position.

Special:

- A valid Class “C” California driver’s license.
- Access to an automobile.